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ABSTRACT

This paper defines and explains action learning and suggests some ideas and resources for putting action learning into practice. The paper is organized in eight sections of about one page each. The sections cover the following topics: (1) what action learning is; (2) how action learning works; (3) action learning and training--key differences; (4) process and performance improvement consultants; (5) why action learning works; (6) professional development opportunities; (7) "ABCs of Action Learning"; and (8) a list of 38 references. (KC)

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Action Learning –

What, How, Why – What Next?

Richard S. Webster, Ph.D.

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What Action Learning Is – A

1. "Action Learning [AL] takes so long to describe, so much longer to find interesting, and so much longer still to get started because it is so simple. [When]...presented as a form of *learning by doing* the dismissiveness pours forth. ... Learning by doing is...one of the primary forces of evolution... since long before our ancestors came down from the trees. ...[AL] is a social process, whereby those who try it learn with and from each other. ... [People] start to learn with and from each other only when they discover that no one knows the answer but all are obliged to find it. ... [AL]...requires questions to be posed in conditions of ignorance, risk and confusion.... A fair statement of Action Learning is... [paraphrasing David and Goliath, I Samuel ch. xvii] 'Now all of us can see...that our ideas simply do not work, we need to look for...some quite new.' ...[AL is a] useful method...not only in making clear the need for [new ideas] ..., but in setting out to develop them.... It is learning by posing fresh questions rather than copying what others have already shown to be useful – perhaps in conditions...unlikely to recur. Most education, and practically all training, is concerned [with]... passing on...the theories [and practices] of yesterday.... But if today is significantly different from yesterday, and tomorrow is likely to be very different from today, how shall we know what to teach? ... [AL] merely asks that...the development of our 'new Davids' will include exploration of their own ignorance and the search for fresh questions leading out of it."
Reg Revans (1907-), inventor of Action Learning (circa 1945), in "Action Learning: Its Origins and Nature," chapter 1 in Pedler, third edition–1997, pages 3-7 (see Resources below).

2. "Action Learning is a dual process. Participants tackle real work opportunities, problems, tasks, and projects, in a context which specifically states learning as an objective. ...This is a Double Value process – two achievements for the price of one. ... [AL project] designers and facilitators ought to provide: a model of the learning process – what should happen when; assistance to individuals... [about] how they and others learn differently from the same experience; ...how to build...learning abilities..., learning from...the immediate Action Learning project, and from...future opportunities."
Alan Mumford, "The Learning Process," chapter 19 in Pedler, third edition–1997, page 229.

3. "Action Learning is a process of reflecting on one's work experience and beliefs in a supportive, confrontational, truth-seeking, reflective environment of one's workplace peers, for the purpose of identifying, selecting and resolving real business problems in real time."
Verna J. Willis – Professor, Georgia State University, Atlanta, eMail <padvjw@langate.gsu.edu>.

4. Action Learning is "a learning process during which a...selected group...is responsible for exploring...and providing recommendations on a current...business problem or opportunity. Throughout this process, individual learning remains a primary objective."
Anthony Fresina, President, Executive Knowledge Works, Palatine, IL-USA. Dr. Fresina was formerly a leader in Motorola University, web site <www.ekw-hrd.com>.

5. Action Learning enables work group leaders and other members of the company to identify, select, work on and solve business problems faced in their day-to-day work. AL is a group-based process for dealing with a real business problem, while pursuing the co-equal matter of learning more about the KSAOs* considered useful for solving the problem by the "AL project team." Problem-selection and priority-setting includes identifying the KSAOs related to each business problem, and a commitment to learning as a key element of working to solve the problem. AL projects require participation and support by members of the company. Key AL resources include process and performance improvement consultants (PICs), CQI,* KM,* OL/LO* and other high-performance tools.
Richard S. Webster, Ph.D. - President, PRM Institute.

* KSAOs are Knowledge, Skills, Abilities and Other performance-related attributes.
Notes, page 10, include a list of abbreviations.

How Action Learning Works – B

6. Background. Action Learning (AL) was invented by Reginald Revans (1907-), in the UK, circa 1945. "Reg" Revans was a Cambridge University physicist (and Olympic long-jumper), a synthesizer of knowledge, a visionary who believed that nothing was impossible! AL is now used worldwide – more in the UK, Europe, Australia and New Zealand than in the U.S.

7. Principles. AL focuses on priority business problems selected by the company; usually difficult, sometimes considered unsolvable. The AL process starts from a position of not knowing the "right" answers, uncertainty, sometimes even fear and confusion. AL assumes (correctly experience shows) that people learn best from each other through shared efforts, including truth-seeking, honest inquiry, questioning, and sharing information. The AL process uses risk-taking, action and reflection, and openness to change as key strategies for problem solving.

8. Goals

1) Identify high-priority business problems.
2) Work on solving these related problems to improve performance and results.
3) Improve AL group members' KSAOs as key resources for their problem-solving work.
4) Increase individual and work group capabilities (including confidence and performance) by AL's co-equal attention to problem solving and continual learning as key resources.

9. Key questions. The AL process begins with questions for a company leader at a level to make something happen, including obtaining the time and dollar resources to support an AL project:

1) "What are we trying to do, what's stopping us? What are the toughest business problems?"
2) "Which of these problems are highest priority; what can we do with them – here and now?"
3) "Are we ready to work on our high priority problems: who knows about the problem; who cares; who can DO something about it?
4) "How do we proceed – what is the best way to solve this problem?"

10. Process. AL project work is done by problem-solving groups (Revans calls them "sets"). AL sets (or "project groups" or "teams") work best with five to 10 members, acting like learning ("study") groups committed to solving a problem while learning what they need to know for generating new ideas that lead to a solution. A member acts as meeting leader or "facilitator." Members decide if the role will rotate – so that all might improve their meeting leadership skills, e.g. presenting, negotiating. Members may also become specialists at certain KSAOs by learning more and sharing their learning with the group. Learning about KSAOs related to the business problem is based members' interests and the group's agreement about what learning will help the group solve their business problem.

11. Benefits. AL alters members' thinking, how they seek new knowledge, how they work together and react to one another. Tolerance and respect for others usually increase. AL helps people use and understand the six disciplines of the learning organization. Also see the "ABCs of AL," page 6.

[Adapted from materials prepared by Professor Verna J. Willis - HRD, Georgia State University]

AL and "Training" – Key Differences – C

12. Topic selection and application. AL involves identification, selection, priority setting and resolution of pressing business problems, while learning about the related KSAOs as a key resource for solving business problems. Learning is the responsibility of AL group members working on each business problem. The responsibility, interest and commitment of AL group members make AL project learning very different from "training topics" brought to mixed "training groups" by internal or external consultants, often based on the organization's assessment of needs.

13. Links to CQI, KM, and OL/LO. AL is a panacea (almost) for adding learning (to training) as a primary strategy whereby individual members and their work group leaders work together to accomplish organizational learning and creating a learning organization ("OL/LO"). Knowledge management (KM) is a key resource for AL. AL supports continual quality improvement (CQI). ASTD's vision is "workplace learning and performance." AL work supports "workplace learning and performance improvement," just-in-time, just-enough, at or close-to the work place.

14. Links to other "high performance" tools. AL has philosophical and process linkages to other high-participation, high-performance, high-effectiveness tools, including balanced scorecard, compression planning, creativity tools, culture assessment, ideas program, multi-source assessment (≥ 360-degree), open-book management, process and system-improvement tools, visual workplace, and workout (GE's problem-selection tool). What other tools might be useful to AL project teams?

15. Application to solving real problems. AL, and high-performance tools, work when they fit the company's culture, are supported by leaders ("managerial leaders" is Peter Vaill's term, see Vaill–1996) and are used for truth-seeking and management-by-fact, i.e. stating and testing hypotheses for improvement of processes, performance, quality, systems and other desired results.

PICs – Process & Performance Improvement Consultants – D

16. PICs – better than "PCs." Those who work to support AL project groups fill the emerging role of "Performance Consultants" (PCs). PCs can better serve AL project groups when they are prepared to be (and are named) "Process & Performance Improvement Consultants" (PICs).

17. PICs are different. PICs, when they are company members, know the company's culture and processes as no outsider can. PICs are often members of the "training or HR" department. At their best, PICs have a sincere desire to help others solve problems and learn. (Bob Greenleaf would likely advise us that this PIC role is useful preparation for "servant leadership;" Peter Block would likely advise the same concerning use of principles and practices of "stewardship.").

18. PICs as AL team members. Process & Performance Improvement Consultants (PICS) are key resources for AL project groups. AL projects benefit from support by those who bring learning resources and process knowledge to the team – as members, NOT as "directors" or "experts."

19. PC materials omit AL support. PC principles and practices come from materials listed under "Resources," below, e.g. ASTD–Info-line #9702, Fuller & Farrington–1999, Gilbert– 1978, Gilley, Boughton & Maycunich–1999, Hale–1998, Nilson–1999, Robinson & Robinson–1995 and 1998. These PC resources give little or no attention to AL – or to CQI or KM or OL/LO.

20. PICs are "PEACE-makers." PICs are different from PCs: more effective and considered essential for AL projects. PICs pass the "PEACE" test for high-performance change: PICs are more Proactive, Entrepreneurial, Assertive, Creative and therefore more Effective than the more conservative and politically correct "PCs." AL projects may threaten the *status quo* and divert resources from training programs. PICs must deal with these changes and their political effects, while providing new problem-solving knowledge and coaching other AL team members.

21. Metrics support the PIC model. Comparing a PIC model with PC models (e.g. references in para. 19) shows that PC models fail to address systems learning, AL, KM, OL/LO – among the core values of those taking primary responsibility for their own learning for solving business problems. Key metrics support these core values, e.g. Deming's assertion that >90% of problems are process and systems problems, and can be solved by those doing the work – if only "they" ("management") would allow those doing the work to make improvements they know how to make, and could make if the company provided permission, support and encouragement (Deming–1994, page 84).

22. PIC workshop is needed. PICs are members of AL groups, and key resource-persons supporting the AL group's learning. A "PIC workshop" enables PCs, other training professionals, and consultants (internal and external) to learn to be effective PICs. PIC Workshops include:

a) **Objectives.** Helping participants identify and learn to use processes and resources (e.g. AL, CQI, KM, and OL/LO tools and activities) for helping AL team members learn to improve their performance and results, while working to solve pressing business problems.
b) **PIC model.** Describing the PIC's role in advising and supporting AL teams and other OL/LO and KM efforts in the company. Effective PICs help AL teams find and use whatever learning resources the team decides will help solve the business problem they are working on.
c) **Experience-sharing.** Workshop participants are asked to share their experiences with similar roles: e.g. as trainers, PCs, coaches, OD (organization development) or HPT (human performance technology) consultants (internal or external). These discussions help apply the PIC model. Guidelines and examples for the PICs role also develop from these conversations.
d) **Contents.** PC models. The need (and opportunity) to go beyond a PC PC role to a higher level of service in the PIC role. Principles and practices of AL, CQI, HPT/OD, KM, OL/LO, and CP (Compression Planning, McNellis Company ™), other high-performance tools, and participants' experience with PIC-related roles. PICs are a key learning resource for AL groups.

Why Action Learning Works – E

AL puts tested theories to work. Examples:

23. Using scientific method. Frederick W. Taylor (1911, 1967) named his "one best way" analysis "scientific management" – which was not scientific. Deming and Juran's work was, i.e. they used "scientific method" to apply SPC (statistical process control), truth-seeking, profound knowledge and related quality improvement practices. Good AL practice calls for stating hypotheses in "IF (we do this), THEN (we expect this to happen, measured by…), AND we also expect these other "good" results which may be difficult to measure but are worth our attention."

24. Learning what people want. Kurt Lewin, Rensis Likert (1961, 1967) and others used survey guided assessment to learn about individual and work group preferences. Good AL practice uses the same common sense process: if you want to know what people think will improve their working lives and the results obtained – have the good sense to ask them! Results may amaze!

25. Viewing human organizations as complex systems. Katz & Kahn (1978), Senge (1990, 1994) and others identify organizational systems, systems thinking and systems dynamics as effective strategies for OL/LO. AL projects can often put these tools to work.

26. Emphasizing learning – individual and work group. Argyris (1993), Deming (profound knowledge, 1994), Senge (1990,1994), Vaill (1996) and others identify learning (each individual's responsibility and opportunity, with the enterprise's support and encouragement) as (1) different from "training" and (2) a key element of improving processes and systems, quality, performance, and other desired results. AL places learning as a co-equal objective with problem-solving.

27. Emphasizing leaders' self-development. Review of more than 200 books on leadership makes clear that self-development is a cornerstone of leadership (see especially Hitt–1993,1996). Leaders that expect others to improve can only succeed (in the long run) when they "walk the talk," when they use learning, teaching, mentoring and coaching as key resources for self-development: her or his very own "career-, leadership-, professional-, or self-development plan."

28. Others: Herzberg's "motivation factors" (1959), Maslow's "hierarchy of needs" (1987), and McGregor's "Theory Y is best" (1960) research also supports AL principles and practices.

Professional Development Opportunities – F

AL is a flexible, powerful, effective process for helping company members learn what their work groups agree will improve KSAOs and (from new learning) produce ideas for solving priority business problems. AL is widely used in the UK, Europe, Australia and New Zealand, less so in the U.S. This creates opportunities for OD, HPT and other consultants (internal and external) who see the AL vision and learn and forward the AL process. Program and product development opportunities include:

29. AL Book. *Action learning handbook: Models & tools for problem-solving, self-development, performance improvement & leadership development.* (Webster, in press – see Resources, page 7) intends to provide comprehensive guidelines for leaders and members of AL groups and for AL consultants. It will include information on many tool sets including CP, CQI, HPT, KM, and OD.# Those interested in this book project are invited to make their interests known.*

30. PIC Workshop (see ¶ D19-22 above). PC workshops are offered by Partners in Change (Pittsburgh) in partnership with the Ken Blanchard Companies (San Diego). These companies have not (yet) expressed interest in creating a PIC workshop. It seems likely that demand exists for a PIC workshop – with proper development and marketing. Those interested in developing or presenting such a workshop are invited to make their interests known.*

31. AL Marketing. AL is likely to be of interest to companies working on OL/LO, CQI and other high-performance strategies (see ¶ C13, C14 above). Forward-looking leaders, including training directors seeking more "bang" from their training budgets and impressive ROI data, are likely to be open to learning about AL. Program and product possibilities may include an "overview" AL workshop, or presentation via the web or a CD. Other AL marketing opportunities exist. Feedback and expressions of interest are welcome.*

32. Community Councils. Many cities have created community councils for quality improvement (Community Quality Councils – CQC) or other continual improvement practices. These councils bring together companies interested in learning "best practices" and working on continual improvement. A CQC or Community Council for Continual Improvement (C3I) in Columbus and central Ohio seems worth discussing. "Workforce development and training" and economic development can be improved. A key metric is the low level of transfer from "training" to performance improvement on-the-job. "Not more than ten percent of these [training] expenditures...result in transfer to the job" (Baldwin & Ford, *Personnel Psychology*, 1988, 41, page 63). Robinson & Robinson (1995) report these data and then observe "Clearly the traditional training approaches do not work" (page 3). Those interested in the council concept for community-wide improvement are sought.*

33. Ohio Award for Excellence (OAE). Ohio's state-level "Baldridge-like" quality program offers an improvement competition in five sectors (business – manufacturing and service enterprises, education, health care, government, and other non-profit enterprises) and at four levels of excellence: "pledge, commitment, achievement" and the "Governor's Award for Excellence. Ohio and more than 40 other state programs have adapted standards and practices from the national "Baldridge Quality Award" program. Seven areas are addressed: leadership, strategic planning, customer and market focus, information and analysis, human resources, process management, and business results. The Baldridge does not (yet) include reporting the use of "high-performance" management and leadership strategies and tools, or is it yet linked with year-around continual improvement efforts such as community councils. Ohio can benefit the State's economy, workforce capabilities, and "person-power" effectiveness by re-stating OAE standards, practices and linkages. OAE's web site is <www.oae .org>. Are you interested in using AL and other high-performance strategies to help improve OAE?*

See abbreviations, page 10.
* See contact information, Contents, page i.

The "ABCs" of Action Learning – G
Attributes – Benefits – Characteristics

Action Learning (AL) is a group-based process for solving pressing business problems. AL teams work on and solve priority problems faced in day-to-day work, with the organization's encouragement and support. AL team members learn more about the KSAOs* they consider relevant to the business problems – as resources for their problem-solving work. AL is "...the DNA of a learning organization,...[it] enables and forces [the] organization to continuously learn...and thereby...adapt to [its] environment..." (Marquardt–1997, page 9).* AL teams solve problems; performance and results improve. Organizational learning increases; a learning organization develops (OL/LO). Attributes, benefits and characteristics – the "ABCs" of Action Learning# – include:

1. Active involvement by company members is expected, recognized and rewarded.
2. Assumptions about improvement strategies and practices are surfaced and challenged.
3. Boundary barriers are overcome by attention to cross-function business problems.
4. Company members work on real job-related problems; related KSAO learning is a resource.
5. Continual learning and improvement are encouraged, payoffs from problem-solving occur.
6. Consultants** provide process and KSAO advice; members directly involved make decisions.
7. Critical thinking skills develop as members work on real problems in real time.
8. Cross-function problem-solving groups provide new perspectives, viewpoints and ideas.
9. Experimentation ("if-then, and..." truth-seeking") is used as a key problem-solving strategy.
10. Feedback contributes to learning, improved performance and results.
11. Functions, procedures and processes are all "in play" for improvement and problem-solving.
12. Group responsibility for problem-solving empowers members and adds to their learning.
13. How-to skills are developed for learning, problem-solving and continual improvement.
14. Information is generated, shared and used to create knowledge for solving problems.
15. Just enough / just-in-time learning is accomplished – on and close-to the job.
16. Knowledge is systematically developed as tests and learning lead to problem-solving.
17. Knowledge resources increase and knowledge management (KM) benefits from AL projects.
18. KSAs* are developed by members as learning resources for solving business problems.
19. Learning and working are integrated, practiced and accomplished simultaneously.
20. Learning culture and skills are developed in work groups and throughout the company.
21. Learning organization (LO) disciplines are practiced and developed as company resources.##
22. Learning-by-doing becomes the company's way of working and making improvements.
23. Mistakes are expected, accepted, examined and learned from; after-action reviews occur.
24. Networks develop, encouraging communication, knowledge-sharing and feedback.
25. On-the-job learning is emphasized; ROI increases from investments in AL.
26. Organizational learning (OL) is demonstrated, capability and knowledge resources increase.
27. Outcomes include problem solving, learning, satisfaction and performance improvement.
28. Planning identifies business problems, sets priorities and identifies problem-related KSAOs.
29. Priorities are set by AL teams with the company's approval, problem-solving follows.
30. Problem-focus predominates, problem-solving capabilities increase.
31. Problem-solving emphasis increases members' sense of urgency and need for action.
32. Processes and systems are examined with added knowledge, new ideas and fresh viewpoints.
33. Questioning (of practices, assumptions and processes) solves problems, improvements follow.
34. Results are emphasized and achieved, satisfaction increases, performance improves.
35. Satisfaction increases from solving problems and improving performance.
36. Self-worth increases when work-related problems are solved by members directly involved.
37. Systems viewpoint encourages cross-functional problem-solving and process improvement.
38. Thinking, communication and problem-solving skills improve; useful feedback increases.
39. Truth-seeking ("if-then, and..." experimentation) is encouraged; scientific method is applied.
40. Working, problem-solving and learning are integrated – synergy occurs.

*, #,**,## – see Resources (page 7) and Notes, page 10.

Resources – H

These learning resources are listed for those interested in AL principles and practices: 38 books and one monthly publication (ASTD's *Info-line*).

Argyris, Chris. ***Knowledge for action: A guide to overcoming barriers to organizational change.*** Jossey-Bass–1993. Step-by-step guidelines for diagnosing an organization's capacity to learn. Learning occurs when we take effective action, when we detect and correct error (page 3). ...An error is any mismatch between intended and actual consequences" (page 49).

*ASTD. "From training to performance consulting." Info-line #9702. Useful guidelines for a key role change that all HR professionals must deal with. Includes "transition planner" job aid.

*Biech, Elaine & Karen Vander Linde, editors. ***Building high performance: Tools and techniques for training and learning.*** ASTD–1998.

*Brethower, Dale & Karolyn Smalley. ***Performance-based instruction: Linking training to business results.*** Jossey-Bass/ Pfeiffer–1998. Deals with performance, does not deal with learning as a different (and better, i.e. more effective) set of interventions.

Delavigne, Kenneth T. & J. Daniel Robertson. ***Deming's profound changes: When will the sleeping giant awaken?*** Prentice Hall–1994. Describes the necessary transition from Taylor's "one best way" (misnamed "scientific management") to the "scientific method" implicit in the statistical process control methods developed by Shewhart, Deming, Juran, and other quality improvement pioneers. Continual improvement of quality, processes and results comes from individual and work group learning, ideas resulting from new knowledge, and members' "constructive discontent."

Deming, W. Edwards. ***The new economics for industry, government, education.*** MIT, Center for Advanced Engineering Study, second edition–1994. One key point (among dozens): "Without theory, experience has no meaning. Without theory, one has no questions to ask. Hence without theory, there is no learning. Theory leads to prediction. Without prediction, experience and examples teach nothing... (page 103).

_____. ***Out of the crisis.*** MIT, Center for Advanced Engineering Study–1986. Probably the most-quoted (and least-read) book on quality improvement. Bases quality improvement on "management" knowing (and doing) its job, and on learning.

Dotlitch, David L. & James Noel. ***Action Learning: How the world's top companies are re-creating their leaders and themselves.*** 1998-Jossey-Bass (800-956-7739). The authors, consultants to senior management at large international companies, describe AL processes for high-level, cross-functional, leadership development.

*Fuller, Jim & Jeanne Farrington. ***From training to performance: Navigating the transition.*** Jossey-Bass/ Pfeiffer–1999.

Garvin, Daniel A. ***Learning in action: A guide for putting the learning organization to work.*** HBS Press–2000. Calls for leaders to teach as a strategy for their own learning and self-development.

*Gilbert, Thomas F. ***Human performance: Engineering worthy performance.*** McGraw-Hill–1978. This classic combines engineering logic with long experience to examine barriers to improved performance, including environment, information, instrumentation and motivation – and how to overcome these barriers. Describes how to fix processes and systems so people can do their work: faster, better, more happily and successfully.

Gilley, Jerry W., N.W. Boughton & Ann Maycunich. ***Performance challenge, The: Developing management systems to make employees your organization's greatest asset.*** Perseus–1999.

*Hale, Judith. ***Performance consultant's fieldbook, The: Tools and techniques for improving organizations and people.*** Jossey-Bass–1998. Step-by-step guidelines for problem analysis, what interventions to use, and measuring results. Many worksheets, flowcharts and job aids.

*Harless, Joe H. ***Analyzing human performance: Tools for achieving business results.*** ASTD and Human Performance Technologies–1997.

Hitt, William D. ***A global ethic: The leadership challenge.*** Battelle Press–1996. Defines a global ethic that can serve as a framework for organizational leaders and their leadership. Extends the key point made in *Model Leader* (1993): the effective leader is a "fully functioning person."

* These resources address performance consulting (PC) and performance improvement (PI), primarily from the standpoint of traditional training, internal consulting, HPT and other OD-type practices. They do not deal specifically with AL, CQI, KM, or the PIC role (see ¶ D16 - D22).

_____. *Model leader, The: A fully functioning person.* Battelle Press–1993. The fifth of [the late] Dr. Hitt's practical and research-based series about leadership: what it is, why it's critical, and how to build skills and effectiveness on-the-job – beginning with self-awareness and self-development to work toward becoming a "fully-functioning person." Includes references from more than 20 key leadership authors, e.g. Bennis, Block, Burns, DePree, Drucker, Hersey & Blanchard, Likert, McGregor, Peters.

Inglis, Scott. *Making the most of action learning.* Gower Publishing (US)–1994. Listed by Dotlitch & Noel–1998 as "recommended reading." A key resource for *Action learning handbook* (Webster–in press).

Katz, Daniel & Robert L. Kahn. *Social psychology of organizations.* John Wiley, second edition–1978. Describes organizational systems and sub-systems in useful detail, supporting Senge's work on "systems thinking" as a key discipline for learning organizations.

Likert, Rensis. *Human organization, The: Its management and value.* McGraw-Hill–1967. Develops the case, made in his *New patterns of management* (1961), for building effective work groups, using their overlapping group membership as a resource for inclusive leadership and management, and using survey-guided needs assessment to learn what improvements are likely to work as resources for more effective performance and results.

Mager, Robert F. & Peter Pipe. *Analyzing performance problems, or you really oughta wanna.* Center for Effective Performance, third edition–1997. Describes performance problems, and the dozen or so things that might solve them – only one of which is "training."

Marquardt, Michael J. *Action learning.* INFO-LINE, ASTD–April, 1997. Listed by Dotlitch & Noel–1998 as "recommended reading." A key resource for *Action learning handbook* (Webster–in press).

_____. *Action learning in action: Transforming problems and people for world-class organizational learning.* 1999-Davies-Black (650-691-9123) and ASTD (800-628-2783). Reg Revans, father of action learning, (circa 1945) writes in the Foreword: "The history of mankind supports the commonsense ideas of action learning--the importance of posing fresh questions and taking action on ideas" (page x). The author continues: "Action learning is a deceptively simple yet amazingly intricate problem-solving strategy that has the capacity to create powerful individual and organization-wide changes. It is built on...organizational, sociological, epistemological, and psychological systems that energize and synergize each other in the process of transforming problems and people. The potent resources inherent in action learning offer tremendous opportunities for individuals, [work groups], teams, and organizations to grow and develop" (Preface, page xi). AL is "...built on solid [and tested] theory from...education, management, psychology, and sociology (page xii). ...[AL] is a powerful problem-solving process as well as a program that has an amazing capacity to simultaneously effect powerful individual and organization-wide changes" (page 1).... "[AL]...is undoubtedly the most powerful tool available for organizations to simultaneously accomplish five critically important functions: solving complex...[business] problems, developing a learning organization, building [work groups into] effective teams, developing leaders, and helping people achieve personal and professional growth..." (pages xii, 5,243). Describes how-to implement an AL program with more than 30 check-lists and key-point summaries. A key resource for *Action learning handbook* (Webster–in press).

_____. *Building the learning organization: A systems approach to quantum improvement and global success.* McGraw-Hill–1996. Describes the changes needed in organizational sub-systems (learning, people, knowledge, technology) to empower all members and accomplish improvements in processes and systems, performance, problem-solving, and other desired outcomes.

Mumford, Alan, editor. *Action learning at work.* Gower (US)–1997. Dotlitch & Noel (1998) say this is "recommended reading."

*Nilson, Carolyn. *Performance consulting toolbook, The: Tools and activities for trainers in a performance consulting role.* McGraw-Hill–1999.

Pedler, Michael, editor. *Action learning in practice.* Gower (US), third edition–1997. Dotlitch & Noel (1998) say this is "recommended reading."

Raelin, Joseph A. *Work-based learning [WBL]: The new frontier of management development.* Prentice-Hall–2000 (publishers of the "Addison-Wesley Series on O.D.," edited by [the late] Richard H. Beckhard and Edgar H. Schein). "...A practical guide...explores how to learn collectively...how to engage...reflective powers to challenge...assumptions that...hold us back from questioning standard ways of operating" (page iv). Describes three types of WBL (action learning, communities of practice and action science); the place of reflection ("re-thinking experience and its meanings..."); facilitation roles; action projects; managing and evaluating WBL. WBL "...refers to [the]...action tradition of working on real problems..., incorporating...familiar practices (journaling, mentorships, developmental planning) in addition to action projects and learning teams. [WBL] emphasizes the value of reflective

practice as a collective sense-making..." (eMail from the author, 11/2/99). Includes brief descriptions of 28 other titles in the Addison-Wesley Series on OD (pages v-x, (c) dates 1977-1999, series begun in the late 1960s). Among the first to deal with learning as a key OD strategy. A key resource for *Action learning handbook* (Webster–in press).

*Robinson, Dana Gaines & James C. *Performance consulting: Moving beyond training.* Berrett-Koehler–1995.

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Schein, Edgar H. *Organizational culture and leadership.* Jossey-Bass, second edition–1992. Describes six aspects of a company's culture, including "learning cultures and learning leaders."

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*Stolovitch, Harold D. & Erica J. Keeps, editors. *Handbook of human performance technology [HPT]: Improving individual and organizational performance worldwide.* ISPI and Jossey-Bass/Pfeiffer, second edition–1999. Forty-four original chapters by leaders in the HPT field.

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Vaill, Peter B. *Learning as a way of being: Strategies for survival in a world of permanent white water.* Jossey-Bass–1996. Describes how "managerial leaders" can be more effective by using self-directed, creative, expressive, feeling, on-line, continual and reflexive learning. Constructive criticism of "training and development" as now practiced – and convincing logic and evidence why "learning as a way of being" is more effective for dealing with rapid, continual and turbulent change in the global information-knowledge-e-society.

Webster, Richard S. *Action learning handbook: Models & tools for problem-solving, self-development, performance improvement & leadership development.* In press.

Notes – I

* KSAOs are Knowledge, Skills, Abilities and Other performance-related attributes, including capabilities, competencies, expertise, and proficiencies; also the many non-learning / non-training impediments to improving performance and results by work group leaders and other members of the company, e.g. culture, company "ownership" of systems and processes, permission to work on making improvements and rewards and punishments for making changes. Mager & Pipe (1997) and Gilbert (1978) deal well with the "…Other performance-related attributes."

\# Action Learning's "ABCs" (Attributes, Benefits, Characteristics) are adapted from Marquardt: 1996–pages 40-41, April, 1997–page 9, 1999; from Senge–1990; and from other AL resources.

** "Consultants" to AL project groups benefit from learning the principles and practices of Process and Performance Improvement Consultants (PICS). AL working groups and their projects benefit from those providing process knowledge, facilitation skills and other learning resources for problem-solving. PICs, when they are company members, know the company's culture, processes and performance standards as no outsider can, thereby providing key knowledge resources for AL teams. PICs, often members of the HR or training department, have a sincere desire to help others solve problems and to learn. Effective PICs pass the "PEACE" test for change: they are Proactive, Entrepreneurial, Assertive and Creative, therefore Effective in support of AL teams.

\#\# Five disciplines of organizational learning and learning organizations (OL/LO – Senge, 1990):

1) Personal mastery – improving one's self and ability to deal objectively with reality.
2) Mental models – information, images and metaphors that improve our understanding of the world, how we interact with it and how we communicate our thinking and ideas to others.
3) Shared vision – ability, willingness and opportunity to share personal mastery and mental models with others: members of the family, the company and other communities.
4) Team learning – attaining shared vision among group members, including agreed-upon goals and methods of working, supporting other members, problem-solving and improvement.
5) Systems thinking – the ability and willingness to see interrelationships, "wholes" instead of parts, to understand content and how to improve systems and their constituent processes.

Another "essential discipline" for organizational learning and building learning organizations (OL/LO) is added by Marquardt (1996):

6) Dialogue – "…Intense, high-level, high-quality communications, listening, and sharing; …exploration of subtle issues, …suspending…one's own views;…learning…to recognize…patterns of interaction… [related to] learning;…critical for…coordinating learning and action;…promotes thinking…taps the collective intelligence of groups;…forces us to focus on…how and why [our] perceptions influence how we perceive reality;…the ability to recognize leaps of abstraction…, expose what [is not being said]… balance inquiry and advocacy, face up to distinctions between espoused theories (what is said) and theories-in-use (the implied theory…in what [is done]);…building common ground" (pages 43, 46-47).

Abbreviations

ABCs – Attributes, Benefits, Characteristics
AL – Action Learning
C3I – Community Council for Continual Improvement
CP – Compression Planning, ™ of The McNellis Company
CQC – Community Quality Council
CQI – Continual Quality Improvement
HPT – Human Performance Technology
ISO – International Standards Organization
KM – Knowledge Management
KSAs - Knowledge, Skills & Abilities
KSAOs – see * above
OAE – Ohio Award for Excellence
OD – Organization Development
OL/LO – Organizational Learning, becoming a Learning Organization
PC – Performance Consultant, Politically Correct
PEACE – see ** "Consultants" above
PICs – Process & Performance Improvement Consultant
QI – Quality Improvement
ROI – Return On Investment

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Dr. Richard Webster is President of Personal Resources Management Institute. PRMI (founded 1978) undertakes R&D projects and provides consulting services supporting the paradigm shift to "learning" from "training, instruction, and teaching." PRM Institute serves enterprises interested in the values, principles and practices of organizational learning and becoming learning organizations.

Dr. Webster joined The Ohio State University in 1981 as Director of Executive Education and taught from 1986 to 1994 in the Fisher College of Business, Faculty of Accounting and Management Information Systems.

Program and management responsibilities in Executive Education included needs assessment, marketing, design, presentation and learning quality assessment for some 200 programs each year. Clients included American Electric Power, Battelle Memorial Institute, IBM, Lazarus, the National Association of Wholesaler Distributors, Robert Morris Associates, and Wendy's.

Before coming to Ohio State he was Research Director and then Executive Director of the Higher Education Management Institute (HEMI), at the American Council on Education (ACE), Washington, D.C. Previously he taught at Michigan State and Florida International Universities and worked in planning, budgeting and research administration at The University of Michigan, Grand Valley State University, the Governor's Budget Office and State Board of Education in Michigan and at Florida International University.

Dick completed graduate work at The University of Michigan following undergraduate work at Antioch College. He has published more than 30 articles, books and other learning resources in higher education, planning, management, and continual improvement of quality and performance. (See list–over)

Learning programs and resources, developed for PRM Institute, include:

- Action Learning (Revan's model, circa 1945) for business problem-solving and continual improvement of processes, systems, quality, performance and results.
- Creative Ideas in Action® (CIA®). Learning incites ideas. To find good ideas seek many ideas. *Every* process can be improved, company members know how.
- Learning Quality Assessment® (LQA®) for programs and publications.
- Organizational Learning / Becoming a Learning Organization (OL/LO): why it makes sense, how to use leadership models and tools for continual improvement.

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31. *Action Learning Handbook for Relational Leadership: Models and Tools for Self-development and Performance Improvement.* Marc Cloutier co-author. PRM Institute–in press (2000). Models, processes and tools for applying the scientific method and proven leadership models for solving pressing business problems and achieving continual improvement of processes and systems, quality, performance and results. Enterprises committed to organizational learning and becoming learning organizations (OL/LO) can benefit: companies, schools, colleges, universities, and other organizations.
30. "Multi-source Assessment Process"™ (MAP™). PRM Institute–1997. Instrument, feedback reports and action planning guidelines. Materials and guidelines for ≤ 360-degree assessment. Tested by >1,600 leaders and members in >250 work groups in a high-tech company.

... * – item omitted, complete list available.

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27. "Servant-leadership: Precursor to effective quality improvement." October, 1993. Invited paper for the Robert Greenleaf Center Annual Conference on Servant-Leadership.
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1. *Manager's handbook, Program handbook, Program overview, Task force handbook,*
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